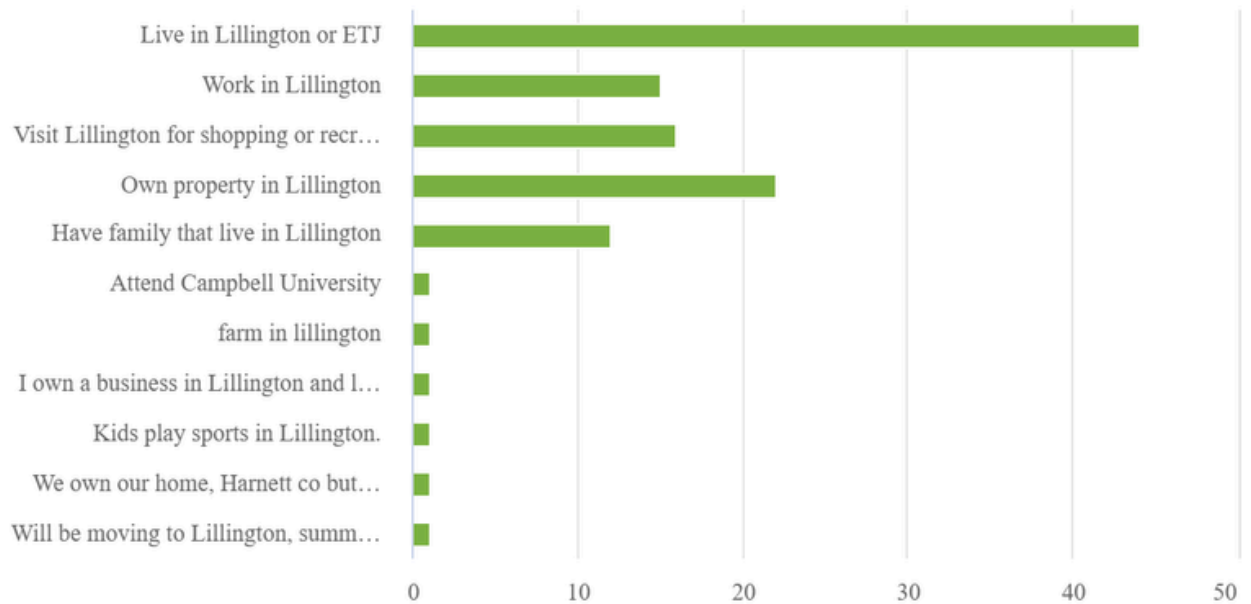


APPENDIX

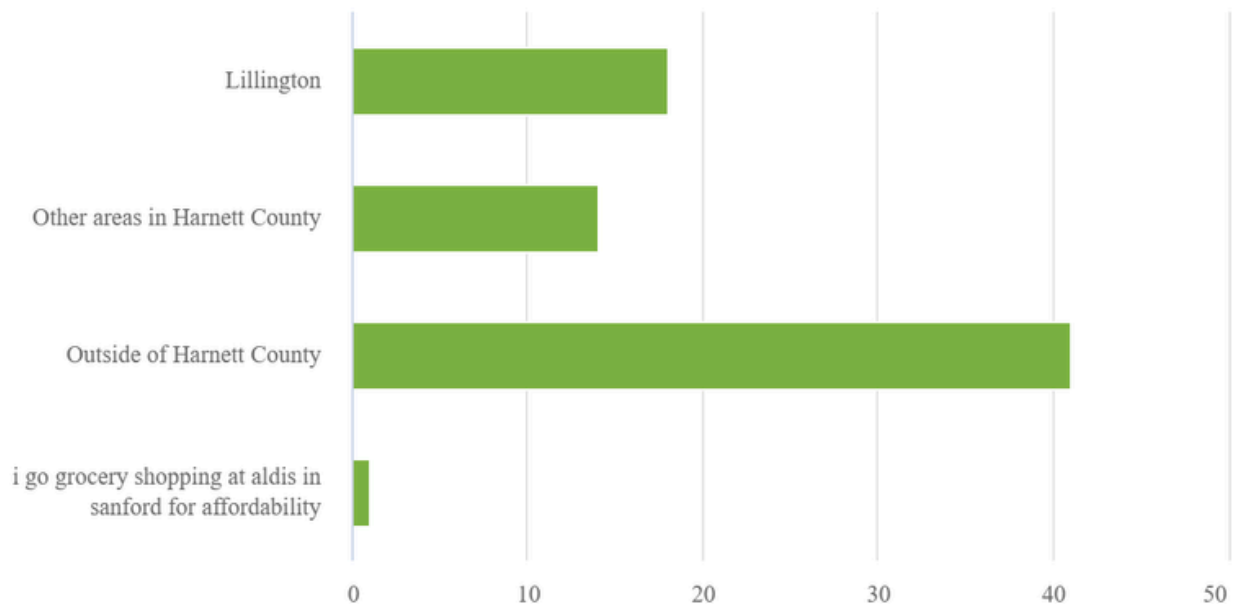
- **Public Survey Results**
- **Maps**
- **Economic Strategy Report**

Public Survey Results

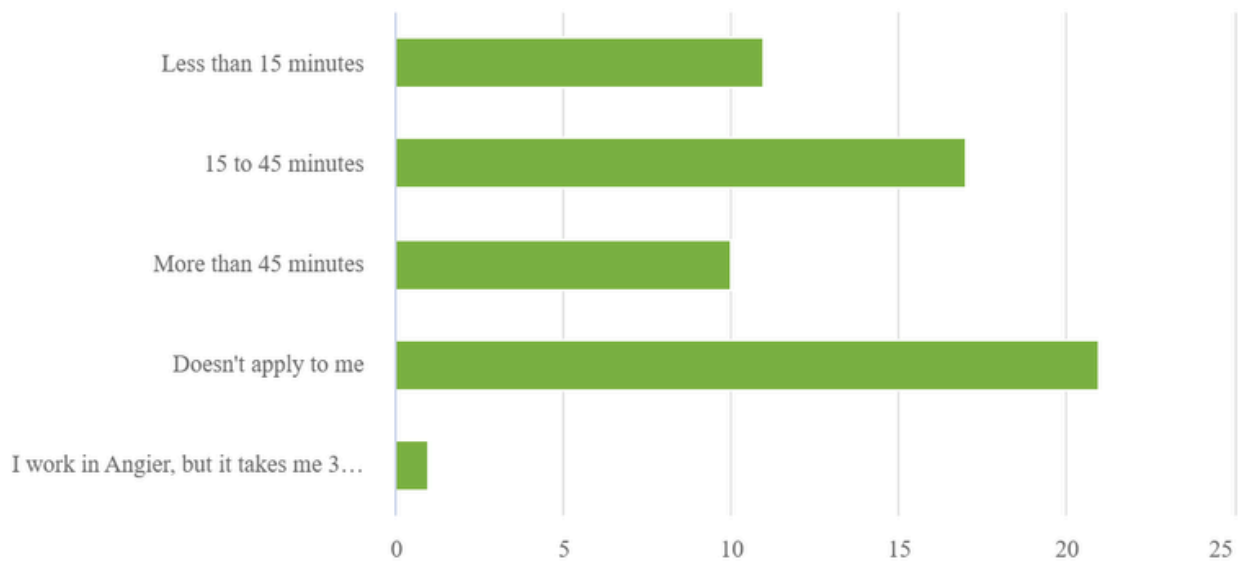
Q1. How would you describe yourself?



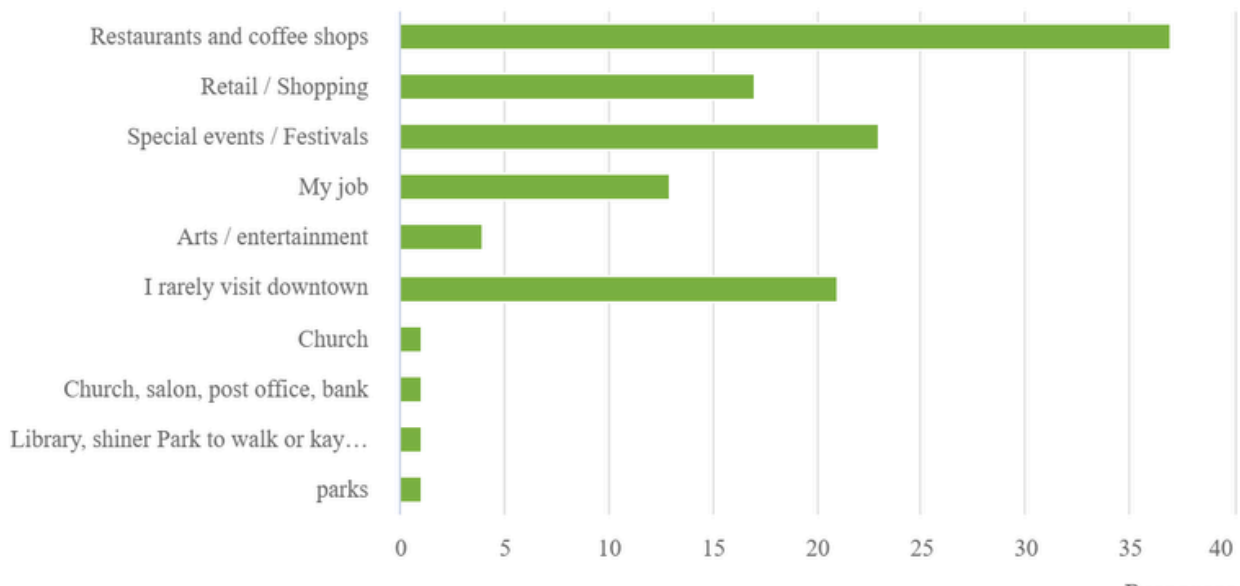
Q2. Where do you mostly go for shopping and entertainment?



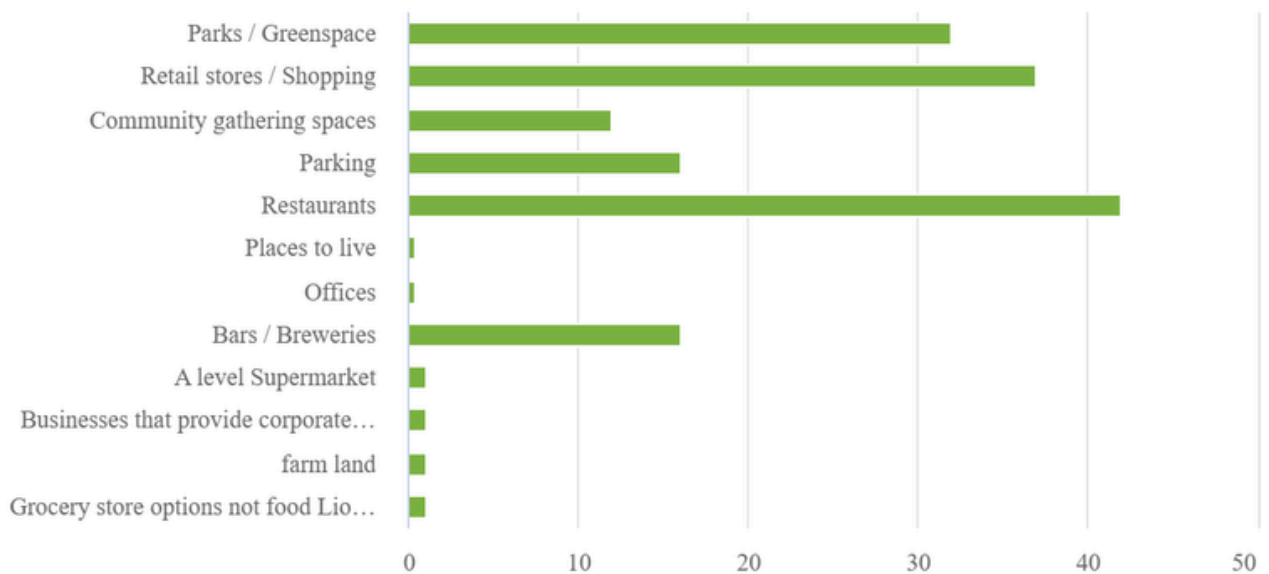
Q3. If you travel for work, how long does your commute typically take (one way)?



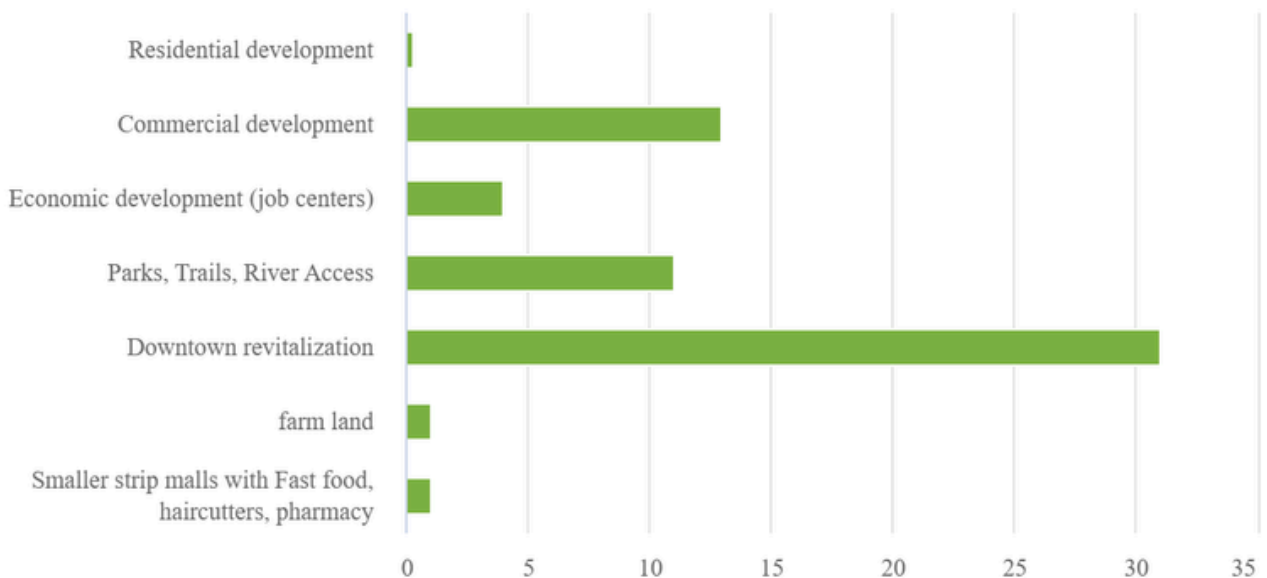
Q4. What typically brings you to downtown Lillington (select your top 3)?



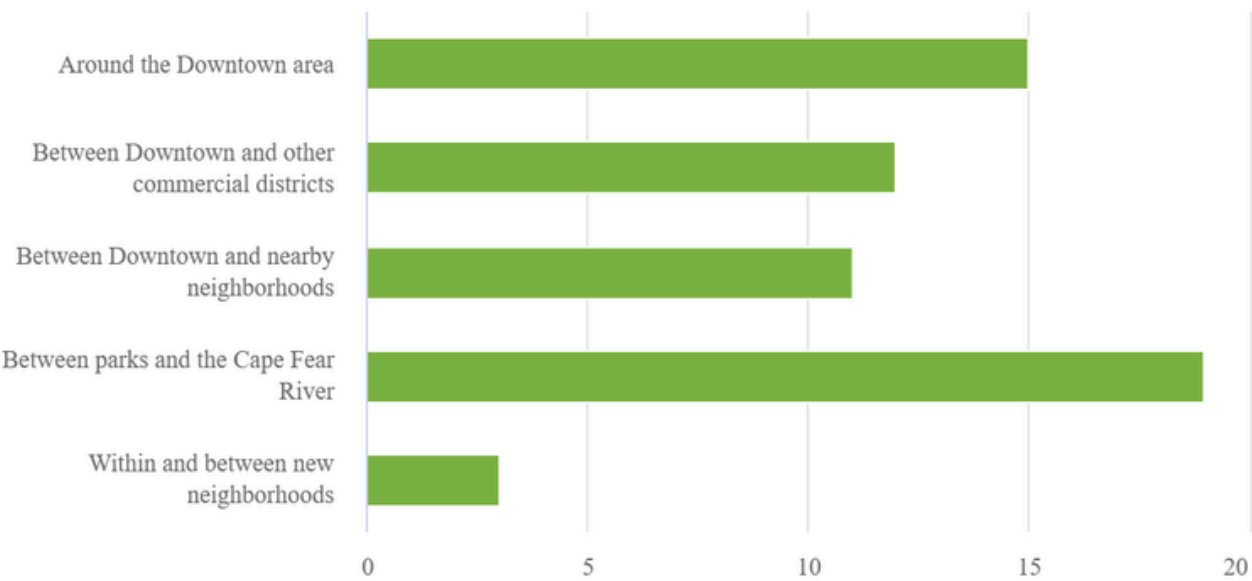
Q5. What would you like to see more of in downtown Lillington?
(select your top 3)



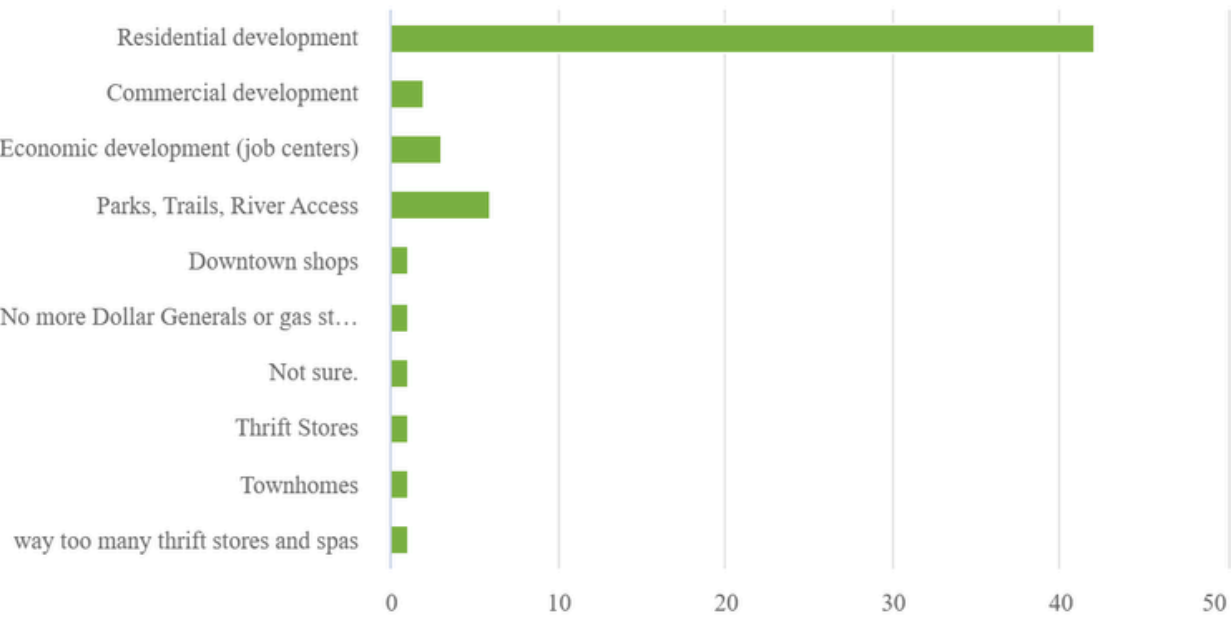
Q6. Which of the following would you like to see more of in Lillington?



Q7. Where are pedestrian infrastructure (sidewalks and trails) improvements most needed?

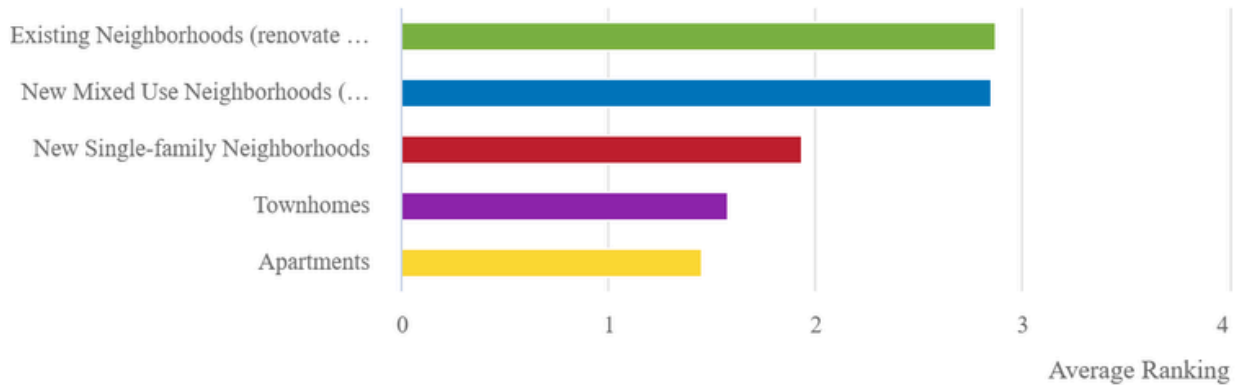


Q8. What type of development do you feel is already plentiful?



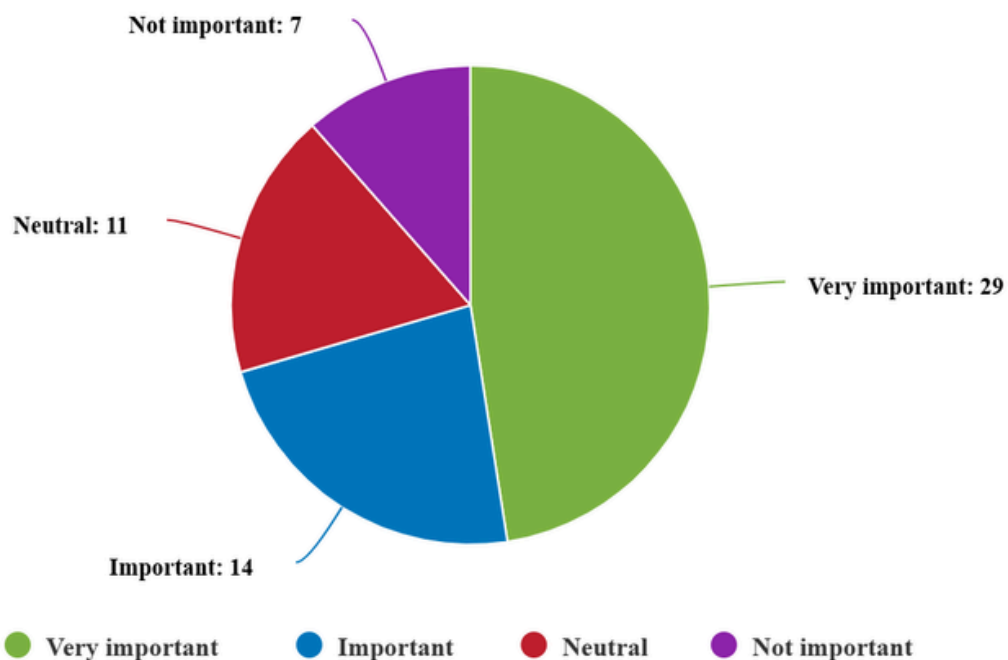
Q9. Please rank the following types of residential development on a 1-5 scale, from most to least needed (1 = most needed, 5 = least needed).

49 answers



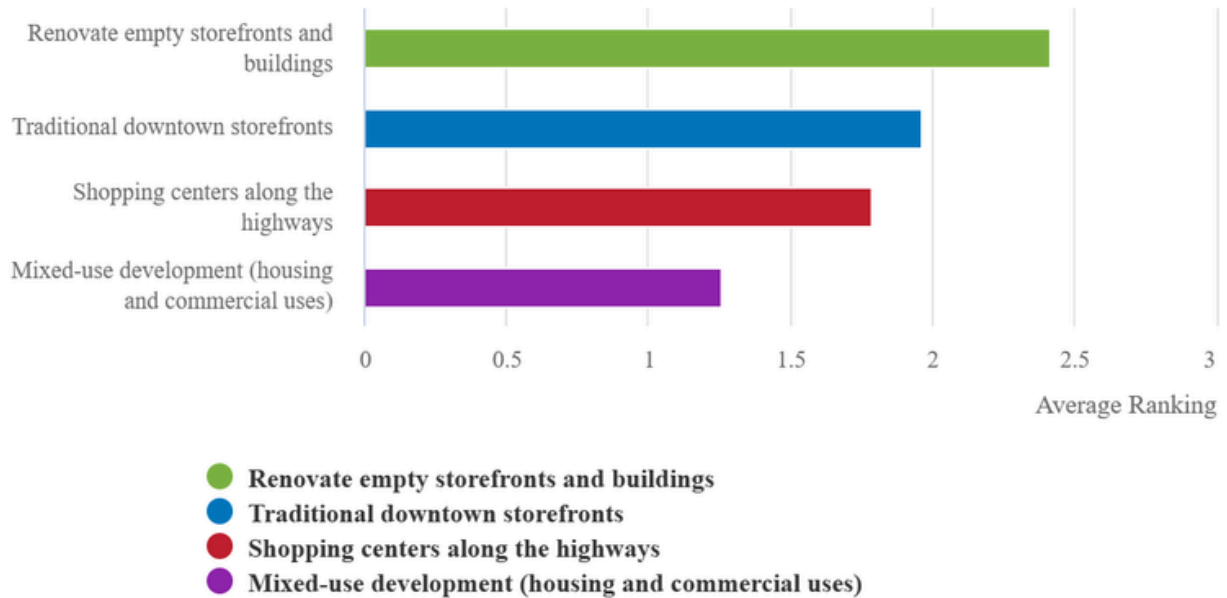
- Existing Neighborhoods (renovate and infill on vacant lots)
- New Mixed Use Neighborhoods (mix of housing types and commercial)
- New Single-family Neighborhoods
- Townhomes
- Apartments

Q10. How important is additional commercial development to you?



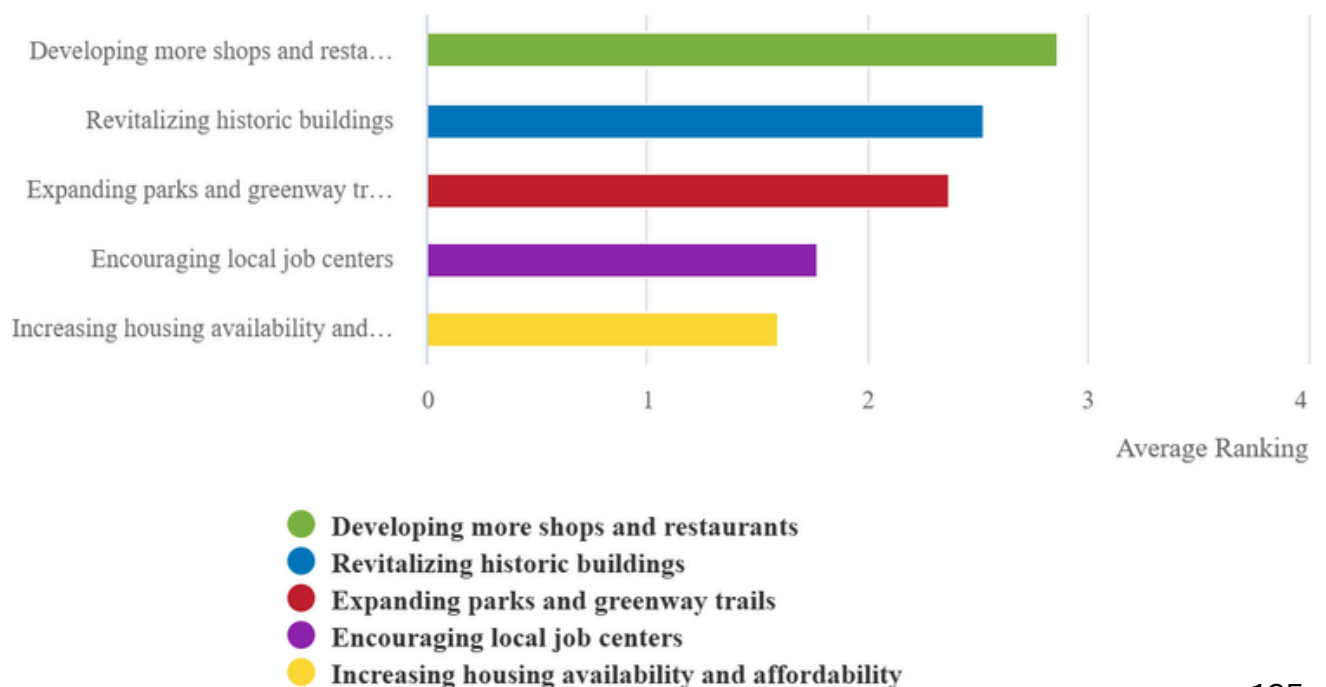
Q11. Please rank the following types of commercial development (shops, grocery, restaurants) on a 1-4 scale, from most to least needed (1 = most needed, 4 = least needed).

49 answers



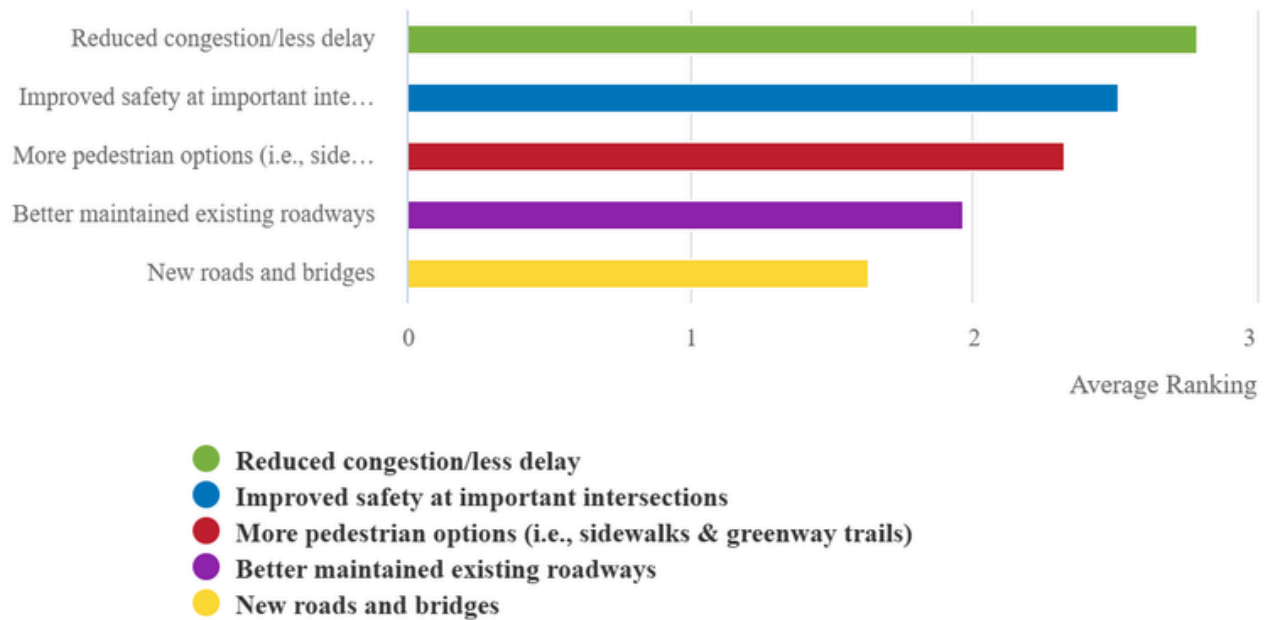
Q12. Please rank the following land use priorities on a 1-5 scale, from most to least needed (1 = most needed, 5 = least needed).

48 answers



Q13. Please rank the following priorities for the transportation system in Lillington on a 1-5 scale, from most to least needed (1 = most needed, 5 = least needed).

48 answers



Q. 14 – What do you believe should be done to better connect the north side of the river with the south side of the river?

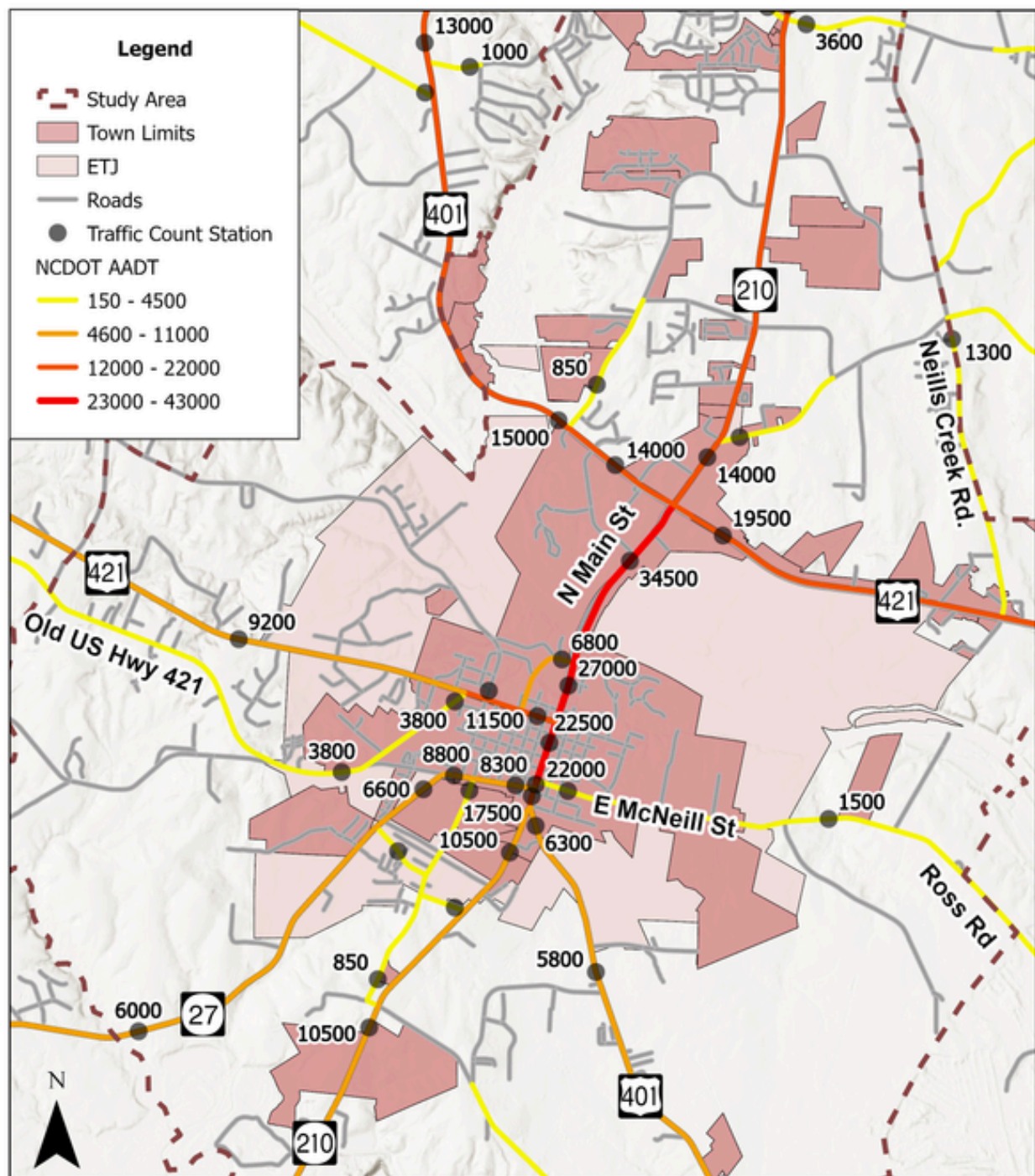
- 20.75% of respondents emphasized the need for additional bridge infrastructure, while highlighting traffic congestion and crossings as problem areas. Suggestions were included such as providing a new bridge or bypass that further connects areas like 401 or between Lillington to Buies Creek.
- 24.53% of individuals suggested that greenway and pedestrian connectivity need improvements. Ideas given were pedestrian bridges, improved walkways, safer sidewalks, and more greenways. Dedicated pedestrian access was mentioned in all respondents' responses.
- 15.09% of respondents expressed interest in downtown revitalization and commercial development on the north side of the river. These responses included creating more shopping, mixed-used development, and improving the north side's identity for a better downtown.
- 7.55% of individuals proposed transportation and accessibility upgrades. Upgrades such as adding more lanes, improving sidewalks, and adding in more local public transit options to further connect both sides of the river
- 5.66% of responses focused on community-building in the area. Like establishing community centers where both sides of the river have equal access to. Other responses included adding better signage and marketing to help promote downtown and its happenings.

Q.15 – What are some ways you think Lillington could take advantage of its proximity to Campbell University?

- 38.64% of respondents wanted to utilize the proximity that Lillington holds to Campbell University to help the overall economic development and business growth of Lillington. Ideas include expanding retail and dining options within the area that may encourage students to come into Lillington. Other ideas included offering university student discounts, creating venues, and providing job opportunities and internships to encourage more students in Lillington.
- 27.27% of individuals emphasized the importance of community engagement and partnerships with Campbell University. Things such as joint events, adult education classes, entrepreneurship/internship support, and satellite classrooms to enhance the collaboration between Campbell University and the Town of Lillington.
- 18.18% of responses highlighted revitalizing the downtown and increasing the vibrancy. Bars, breweries, shopping areas, music events, food truck events, and live music venues were responses to increasing the vibrancy within the Lillington area.
- 18.18% of individuals focused on connectivity and transportation. Including creating greenways, bike paths, trails from Campbell University campus to downtown, and adding public transit to help connect the surrounding areas.
- 18.18% also want to see improvements in the recreation and outdoor spaces, especially along the riverfront. Respondents had suggestions for greenways, running trails, bike trails, and community spaces that would support students and promote the outdoors.
- 11.36% of people called to see more housing and living options and to better attract Campbell University's students, faculty, and staff to live in town. Ideas such as offering discounts along with expanding the apartment/townhome availability were in response.
- 6.82% of responses wanted more promotion of local identity and school spirit. The responses call to add student centered amenities and to better market Lillington to students.

Q. 16 – Is there anything else you’d like to share with the project team?

- 34.48% of respondents emphasized the need for more or updated commercial spaces. Including restaurants, grocery stores, shopping centers, and recreational businesses (YMCA or mini golf were some of the things mentioned in responses).
- 27.59% of individuals highlighted the importance of better design and aesthetics in the downtown area. Respondents described the current downtown as unattractive and dated with unsafe crossings, empty/rundown storefronts, and poor food options. These respondents visioned a more walkable and appealing downtown that should attract the residents, nearby students, and businesses.
- 20.69% emphasized the need for traffic and intersection improvements. This included adding in more traffic lights, making the pedestrian infrastructure safer, expanding lanes, and alternate truck routes in responses. Many responses had concerns with the increased traffic congestion from new housing and emphasized the need for balance with growth and safety.
- 13.79% of people wanted preservation of historic buildings and neighborhoods. Respondents asked for smarter land use and planning that protects Lillington’s rural character.
- 10.34% advocated better code enforcement to revitalize the downtown and improve the town. Neglected public areas and poorly maintained rental properties were highlighted within the responses.
- 6.90% wanted more greenways and parks to balance both sides of the river to support recreational opportunities, which were seen as essential to making Lillington more engaging in the responses.



Map Created: August 2025

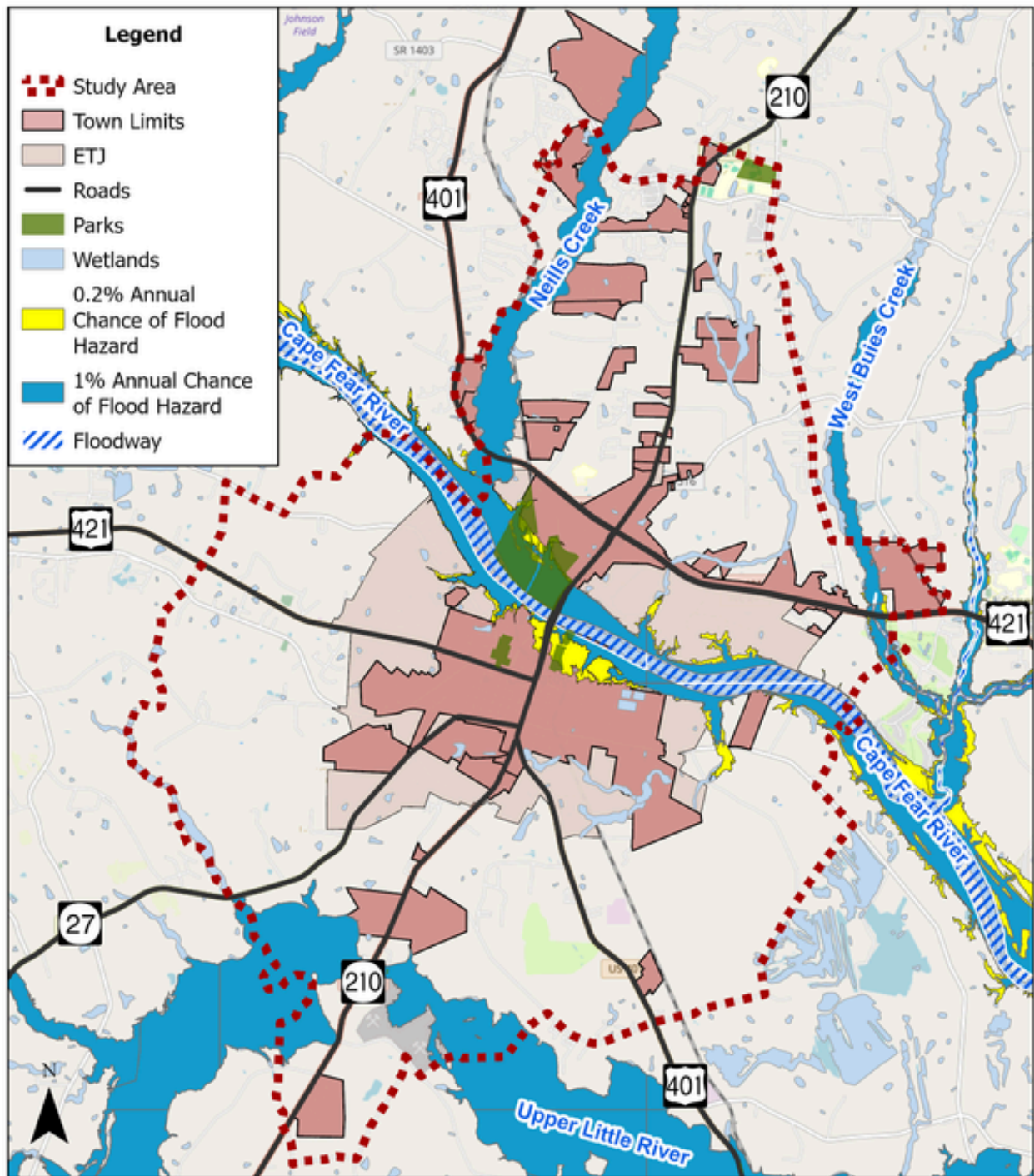
Sources: Harnett Co., KCI Associates of NC, P.A., ESRI

Annual Average Daily Traffic (AADT)

Comprehensive Land Use Plan Update
Town of Lillington

0 0.25 0.5 1 Miles



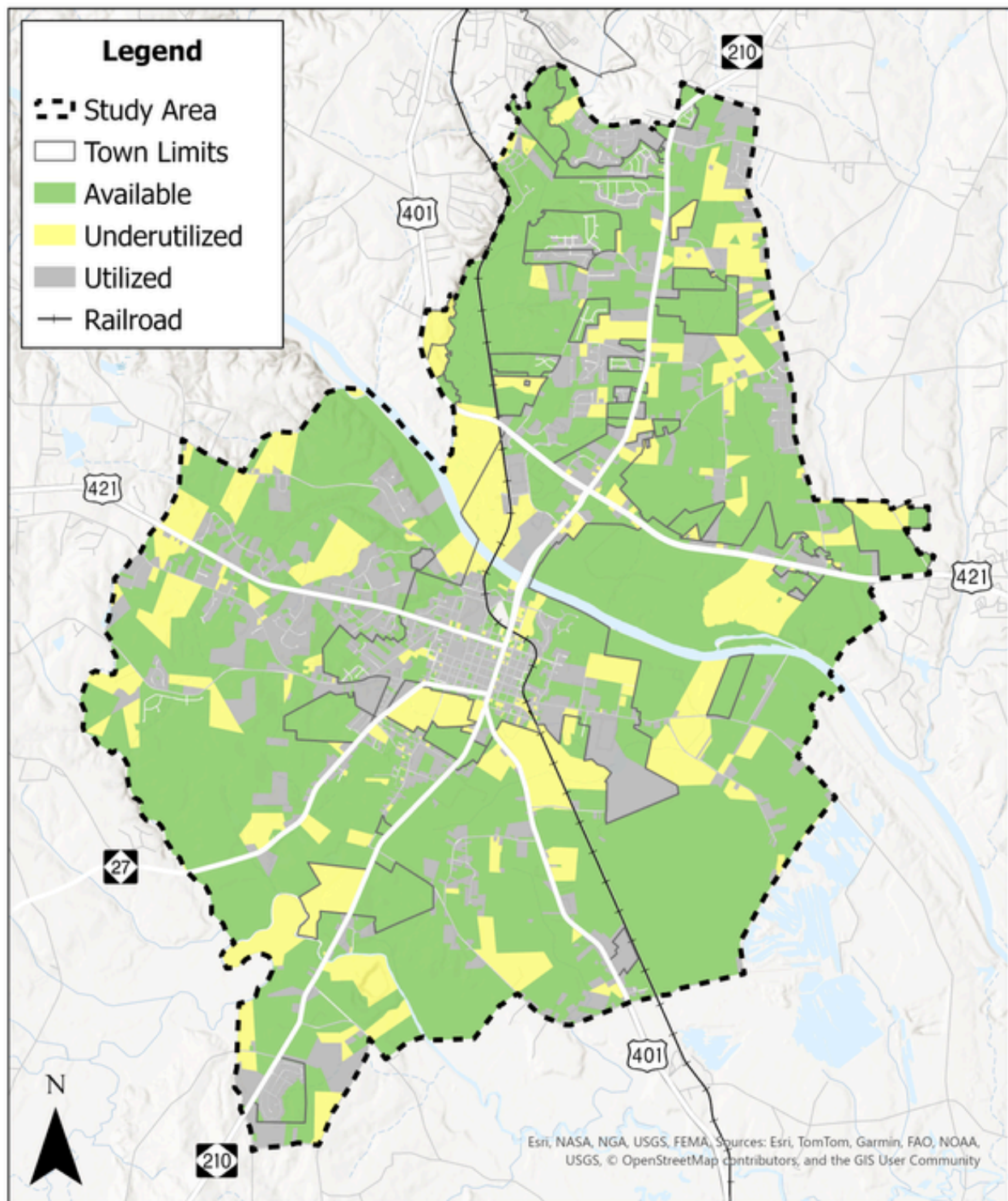


Natural Environmental Features

0 0.5 1 2 Miles

Comprehensive Land Use Plan Update
Town of Lillington





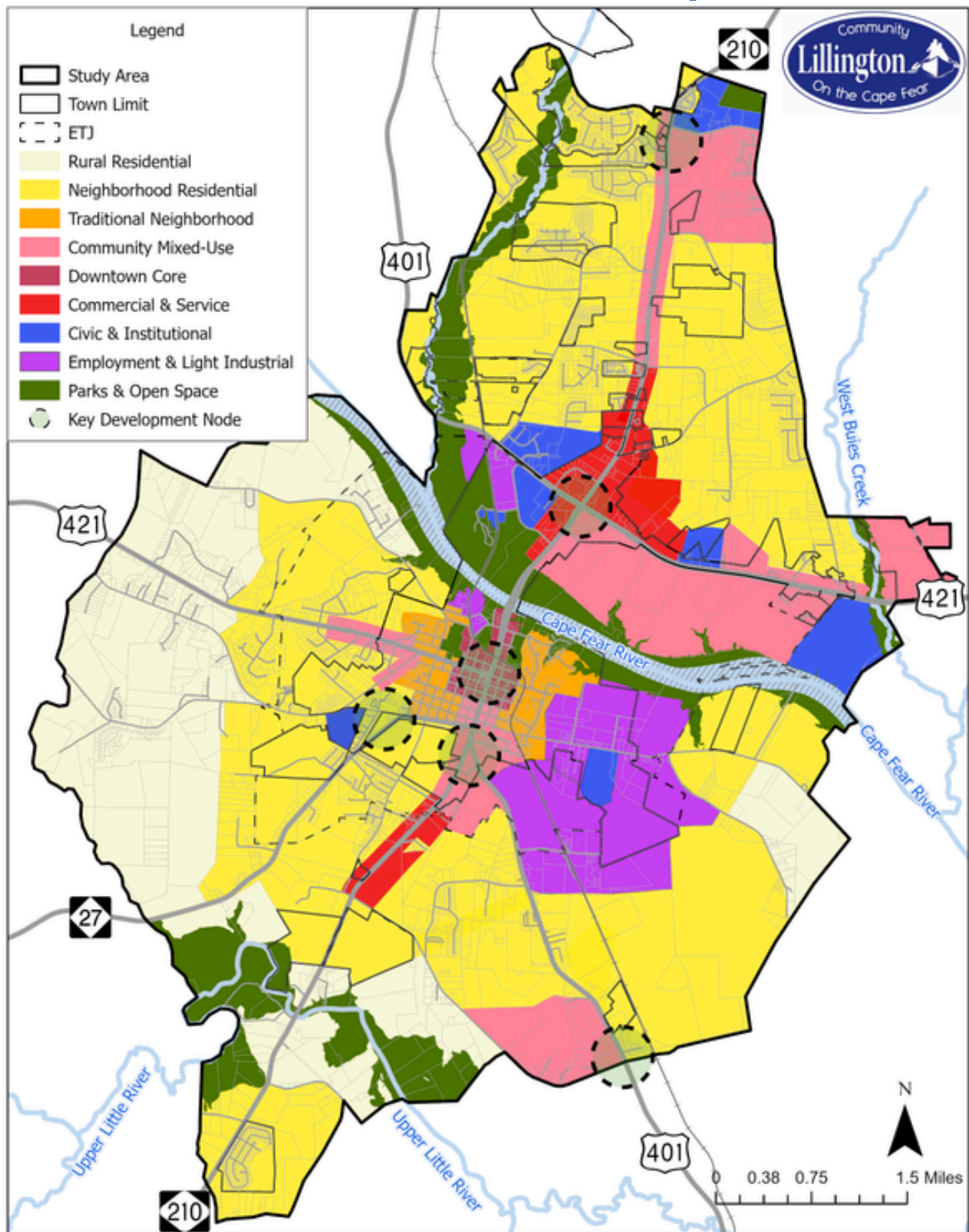
0 0.5 1 2 Miles

Land Supply

Comprehensive Land Use Plan Update



Future Land Use Map





Community Assessment

IN SUPPORT OF THE
COMPREHENSIVE LAND USE PLAN
LILLINGTON, NC
2025

Credit: T. Cluderay Photography

Market Overview & Real Estate Dynamics

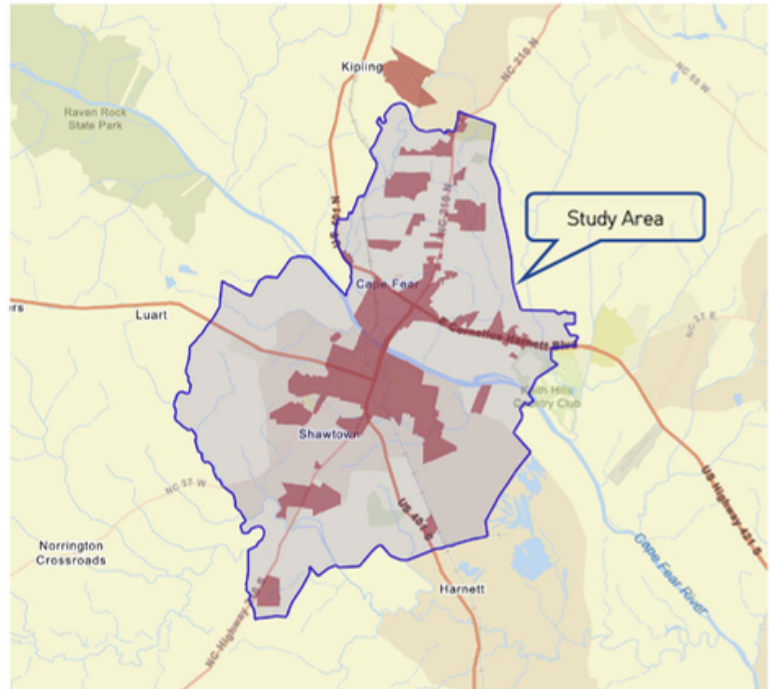
PHASE I

LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

Market Overview

Locational Analysis

This image highlights the comparison between the Lillington town boundaries versus the study area, identified by the town for this report. It encompasses the "area of influence" surrounding the town's current geography.



LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

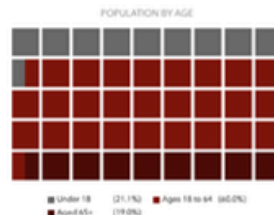
Market Overview

Key Trends & Indicators

Lillington has a low unemployment rate, and the majority of residents are employed in white collar jobs within the study area.

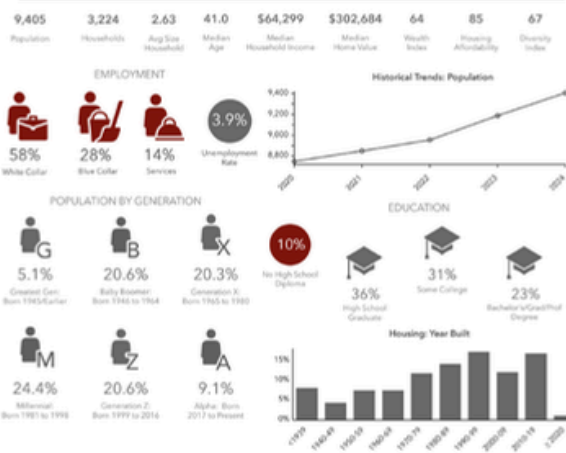
The largest percentage of the population in the study area includes those age 18-64, the town's workforce.

Campbell University brings university students, and the educational attainment of its residents for bachelor's degrees is above the Harnett County average, though lower than the broader Triangle region, suggesting that most graduates leave the community.



Source: The infographic contains data provided by Esri (2014, 2019, ACS 2018-2020, © 2025 Esri)

Population Trends and Key Indicators



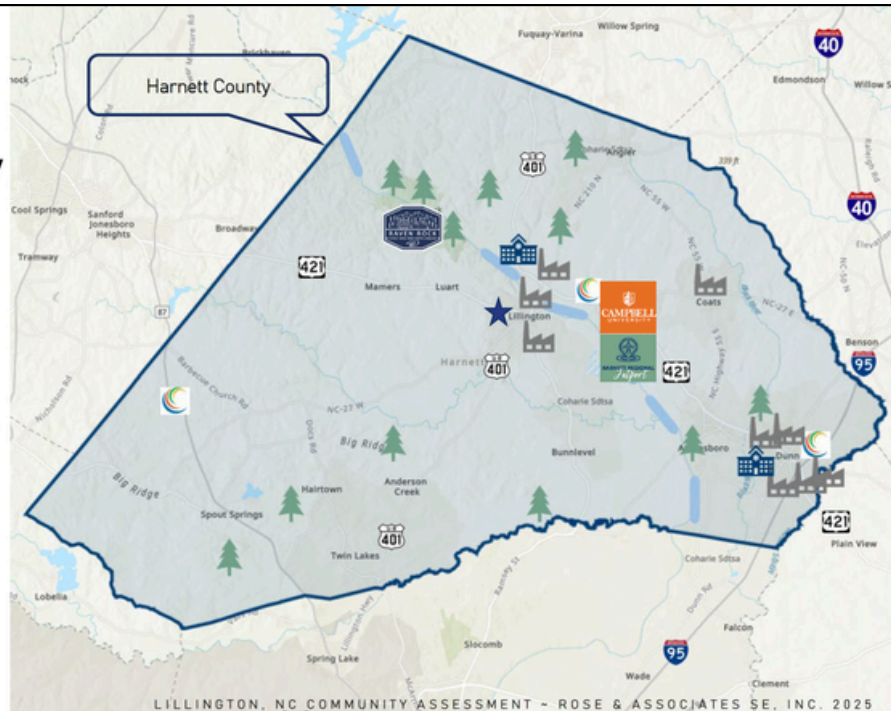
LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Market Overview

Community Assets

Community Assets within the study area and Harnett County include:

-  Campbell University
-  Central Carolina Community College
-  Raven Rock State Park
-  Harnett Regional Jetport
-  Cape Fear River



LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Market Overview

Demographic & Economic Highlights

- Lillington and the surrounding study area have shown steady growth since the 2020 census.
- This includes growth in population (1.6%), median household income (43.5%) and housing units (6.2%) from 2020 to 2024.
- As the county seat and location of Campbell University, Lillington has a large percentage of students and working age population (age 18-64) within the study area.
- Many residents commute outside of Lillington for employment.
- The primary economic driver within the county is educational services (University), while the greatest employment percentage is retail trade.

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Market Overview

Issues & Opportunities

ISSUES

- Cape Fear River physically divides the community.
- Job opportunities limited to a few sectors which could be expanded, such as healthcare and hospitality.
- The community desires more dining and shopping options and must have strategies to attract more consumers.

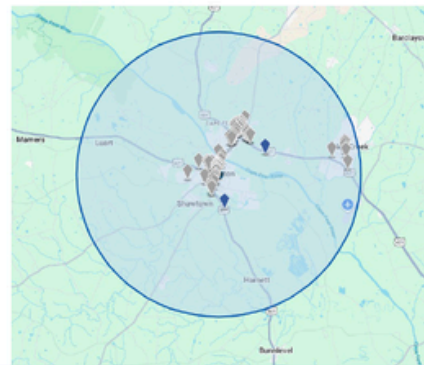
OPPORTUNITIES

- Cape Fear River is a connector for recreation and tourism.
- Gateway and directional signage is needed to highlight downtown and recreation areas.
- Expanded connections via greenways and bike lanes can connect areas within the community.

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Real Estate Dynamics

Commercial Real Estate



There is limited available product inventory and low vacancy which indicates demand and opportunity to expand in these areas where feasible.

Inventory 5-mile radius	Retail	Office	Industrial
Buildings	96	35	13
Existing S.F.	755,899	118,499	810,313
Available S.F.	1,342	3,344	0
Vacancy Rate	0.2%	2.8%	0%

Source: CoStar May 2025

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Market Overview

Retail Inventory

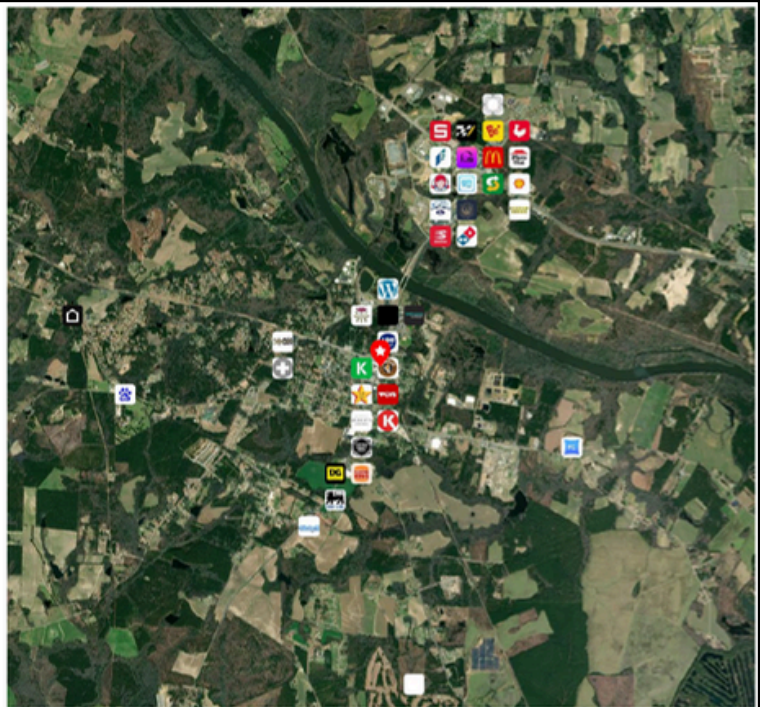
Existing Retail Categories (Supply):

- Grocery
- Fast food
- Gas & Convenience
- General Commercial

Supportive Retail Categories (Demand)**:

- Apparel
- Entertainment & Recreation
- Food & Beverage
- Financial Services

** see Appendix for details



LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Real Estate Dynamics

Residential Housing Overview



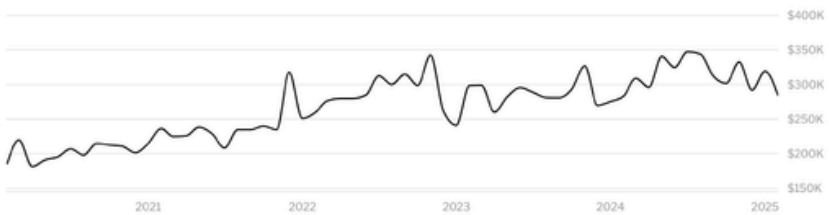
All Home Types ▾

1 year 3 years 5 years

Residential Housing includes single-family homes, townhomes and apartments. Over 60% of the housing stock are owner-occupied homes.

The NC Housing Supply Gap Analysis done by Bowen Research in 2024 indicates that there is a housing supply gap in Harnett County of 3,125 units 2024 - 2029.

According to Redfin, "in February 2025, Lillington home prices were up 0.2% compared to last year, selling for a median price of \$284K. On average, homes in Lillington sell after 87 days on the market compared to 110 days last year. There were 23 homes sold in February this year, up from 12 last year."



Based on Redfin calculations of home data from MLS and/or public records.

Median Sale Price
\$284,000
 +0.2% year-over-year

of Homes Sold
23
 +91.7% year-over-year

Median Days on Market
87
 -23 year-over-year

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Local Market Update for June 2025

A Rose & Associates, Inc. Presentation | Rose & Associates, Inc. 2025



Lillington

Single Family - Existing

	June			Year to Date		
Key Metrics	2024	2025	Percent Change	Thru 6-2024	Thru 6-2025	Percent Change
New Listings	11	10	-9.1%	35	80	+130.0%
Pending Sales	5	5	0.0%	27	33	+22.2%
Closed Sales	6	6	0.0%	23	31	+34.8%
Days on Market (MO) Sale	25	17	-32.0%	51	44	-13.7%
Median Sales Price*	\$371,500	\$315,000	-15.2%	\$355,000	\$335,100	-5.6%
Average Sales Price*	\$374,750	\$303,200	-19.1%	\$358,300	\$289,340	-19.3%
Percent of List Price Received*	100.3%	96.1%	-4.2%	99.7%	96.1%	-3.6%

Single Family - New Construction

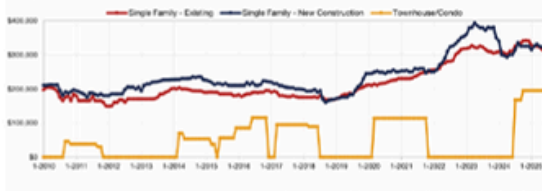
	June			Year to Date		
Key Metrics	2024	2025	Percent Change	Thru 6-2024	Thru 6-2025	Percent Change
New Listings	2	5	+150.0%	27	88	+222.2%
Pending Sales	2	3	+50.0%	15	34	+126.7%
Closed Sales	3	7	+133.3%	22	31	+40.9%
Days on Market (MO) Sale	115	70	-39.1%	85	85	0.0%
Median Sales Price*	\$387,500	\$335,100	-13.5%	\$311,000	\$324,000	+4.2%
Average Sales Price*	\$367,800	\$342,714	+6.8%	\$373,470	\$327,889	-12.2%
Percent of List Price Received*	99.7%	99.8%	+0.1%	99.9%	99.8%	-0.1%

Townhouse/Condo

	June			Year to Date		
Key Metrics	2024	2025	Percent Change	Thru 6-2024	Thru 6-2025	Percent Change
New Listings	1	1	0.0%	2	2	0.0%
Pending Sales	1	0	-100.0%	1	0	-100.0%
Closed Sales	0	0	-	0	0	-
Days on Market (MO) Sale	---	---	---	---	---	---
Median Sales Price*	---	---	---	---	---	---
Average Sales Price*	---	---	---	---	---	---
Percent of List Price Received*	---	---	---	---	---	---

Historical Median Sales Price by Property Type

Rolling 12-Month Calculation



Local MLS Data for June 2025 indicates a softening of the housing market from 2024 through June 2025.

Median Sales Prices:

- Existing Homes: \$315,000 (-15.2% over 2024)
- New Construction: \$335,100 (-12.4% over 2024)
- Townhome/Condo: flat; limited inventory
- Apartments- growth in luxury units challenged with high vacancy



Property Summary Statistics

Property Attributes	Low	Average	Median	High
Units	9	75	55	360
Year Built	1970	2008	2009	2020
Stories	1	2	2	3
Asking Rent/Unit	\$379	\$1,166	\$626	\$1,904
Vacancy %	0.0%	4.3%	5.8%	13.6%

Multi-family Housing - CoStar, May 2025

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Real Estate Dynamics

Commercial and Residential Highlights



Housing

- Supply gap of > 3,000 units through 2029
- Limited diversity of housing types
- Depending on absorption of planned/permitted inventory, additional units should be added.



Retail

- Limited inventory
- Dominant employer
- 10-year demand estimate of 142,000 S.F. could be added to existing inventory.



Office

- Limited inventory
- Expand flexible office and coworking options
- 10-year demand estimate of 102,000 S.F. could be added to existing inventory.



Industrial

- Limited inventory
- Consider land holdings for development
- 10-year demand estimate of 100,000 S.F. could be added to existing inventory.

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Real Estate Dynamics

Issues & Opportunities

ISSUES

- There is a housing gap of 3,125 units in Harnett County, much of which may be filled by pipeline development, depending on permitting and absorption. This includes the Capeton development, which anticipates being built out by 2029. This is largely influenced by interest rates, national economic cycles and local market factors such as employment growth.
- There is limited available inventory of commercial space in all categories signaling an inventory gap in the market.
- The downtown is making slow progress toward fulfilling its potential as a unique destination, as it continues to struggle with through traffic and capturing potential customers.

OPPORTUNITIES

- Develop a housing policy and consider zoning changes to provide for a variety of housing products – both for rent and for sale.
- Collaborate with landowners and Harnett County EDC to provide additional land development opportunities for office and industrial.
- Develop and implement downtown strategy and incentivize expansion of retail, restaurant and entertainment offerings in the downtown, together with streetscape, signage and public art.

LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

Economic Development in support of Land Use

PHASE II

LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

Economic Development

4 Key Elements



LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Economic Development

Small Business & Entrepreneurship(SBE)

The Downtown Lillington Master Plan, adopted in March 2020 provided a road map to creating a vibrant downtown. Several of the recommendations have been implemented, focused on physical changes. The issue of through traffic between US 421 and 401 remains, as businesses attempt to navigate the challenges and improve customer traffic to the downtown, rather than passing by. This includes signage, parking, streetscapes and public art.

The retail attraction plan should focus on small local businesses which will provide a unique character to downtown versus the national chains found along U.S. 401. This might include an economic gardening program, which focuses on growing local entrepreneurs (see Appendix). And it should strive to improve both walk and bike scores to enhance the experience.



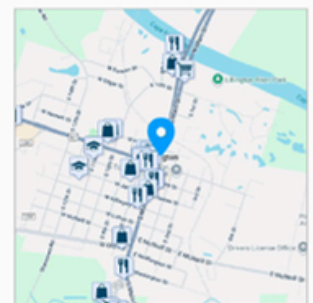
Walk Score
58

Somewhat Walkable
Some errands can be accomplished on foot.

Bike Score
42

Somewhat Bikeable
Minimal bike infrastructure.

About your score



LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

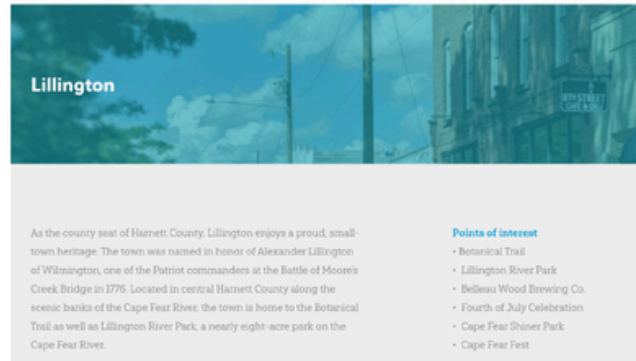
Economic Development Tourism

There are abundant recreational opportunities in the region that support tourism. This includes places to experience, things to do such as events, and opportunities for unique shopping & dining. Lillington should lean into developing a tourism strategy.

Visit Harnett through the Dunn Chamber of Commerce is the primary tourism authority responsible for promoting the County and various points of interest.

[Home - VisitHarnett](#)

Campbell University, expanding regional recreation opportunities and businesses utilizing the Harnett Regional Jetport create demand opportunities to expand hospitality such as hotels, inns and restaurants.



Visit Harnett

A Visitor's Perspective

<https://www.youtube.com/watch?v=sPGjoVziXEs>

LILLINGTON, NC COMMUNITY ASSESSMENT - ROSE & ASSOCIATES SE, INC. 2025

Land Uses in support of Economic Development



LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

Housing Strategy

- Preservation vs. Development

Which areas should be preserved for rural and agricultural development?
Which areas are environmentally constrained?

- Development Densities

Consider the "missing middle". Density could increase where infrastructure already exists and in areas that support walkable neighborhoods with access to services, such as downtown.

Missing Middle Housing is a range of house-scale buildings with multiple units—compatible in scale and form with detached single-family homes—located in a walkable neighborhood.



LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

Economic Development

Issues & Opportunities

ISSUES

- Limited product opportunities for business attraction and expansion.
- Downtown Revitalization is slow and there are limited renovation/redevelopment opportunities, while retail demand expands.
- Limited housing options for all income levels and generations

OPPORTUNITIES

- Expand business campus park opportunities, such as light manufacturing, in and around the Hwy 401 South (Byrd) site.
- Support healthcare and medical office development surrounding the hospital.
- Create an inventory downtown land and buildings and marketing package to promote the downtown.
- Develop a comprehensive housing strategy to expand product types (see following pages).

LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

Summary of Recommendations

Market (Lifestyle)

- Tourism: Create a marketing plan targeting visitors to highlight outdoor assets (e.g. Cape Fear River) & downtown in partnership with VisitHarnett/Chamber of Commerce.
- Create and implement a gateway and directional signage program highlighting major assets & the downtown.
- Improve Walkscore and other means of transportation.
- Expand and highlight connections to trails, greenways to the downtown, University and neighborhoods.

Real Estate (Value creation)

- Inventory and market retail spaces (digital brochure).
- Create a plan for identifying commercial space for retail and restaurants and targeting desired categories using data.
- Inventory and market office/other commercial properties (digital brochure).
- Inventory and market industrial properties.
- Expand details of Carolina Core Housing Study to develop a housing strategy to expand product types and price levels for all life stages.

Economic Development (Fiscal Impacts)

- Highlight workforce development (education) assets including Community College & Campbell University
- Identify industry clusters for attraction that align with educational resources (careers/industries).
- Support expansion of development of industrial & business parks off US Highway 401 in partnership with County Economic Development.
- Support the development of medical office and healthcare uses surrounding the hospital.

LILLINGTON, NC COMMUNITY ASSESSMENT -
ROSE & ASSOCIATES SE, INC. 2025

